

Questions - All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse - ask your preparer if unsure about a question.

Lifestyle & Taxes

Did you pay or receive alimony in 2025?

Yes No

Recipient's SSN: _____ Date of divorce or separation: _____

Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A)

Yes No

Did you purchase a new or used energy-efficient, hybrid, or electric car, or van?

Yes No

Would you like to allow your tax preparer or another person to discuss your return with the IRS?

Yes No

Designee's name: _____ Phone Number: _____ PIN (any five digits): _____

Children & Education

Were any children born or adopted in 2025? (Provide statement for other expenses.)

Yes No

Were any children attending college? (Provide Form 1098-T.)

Yes No

Years of college completed: _____ Years of college completed: _____

Paid by you: Tuition \$ _____ Books \$ _____ Paid by you: Tuition \$ _____ Books \$ _____

Student loan interest \$ _____ Student loan interest \$ _____

Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)

Yes No

Address (Child 1): _____

Address (Child 2): _____

Name of provider: _____

EIN or SSN: _____ Amount paid \$ _____

Did you make any contributions to a 529 plan in 2025?

Yes No

Investments

Did you, or will you, contribute any money to an IRA for 2025?

Yes No

Traditional IRA Roth IRA

Did you roll over any amounts from a retirement account in 2025?

Yes No

Did you sell or transfer any stock or sell rental or investment property?

Yes No

Deductions

Did you make any charitable contributions in 2025? If yes, provide details.

Yes No

Did you purchase a brand new vehicle?

Yes No

YTD Interest: _____ VIN Number: _____

Make: _____ Model: _____

Location of Final Assembly (You can find your vehicle's final assembly location on the manufacturer's label in the driver's door jamb): _____

Business

Did you work from a home office or use your car for your business?

Yes No

Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?

Yes No

Home

Did you purchase or sell a main home during the year? If yes, provide closing statement.

Yes No

Did you make any new energy-efficient improvements to your home? If yes, provide details

Yes No

If you sold a home, did you live in it for the last 2 out of 5 years? If so and you are single, was the profit less than 250,000 or married filing jointly profit less than 500,000? Yes No

State information

Full-year resident Part-year resident Nonresident

State of residence during 2025 and dates: _____

Do you rent or own your home?

Rent Own